

COUNTY OF LOS ANGELES

# **FIVE YEAR STRATEGIC PLAN**

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## **OFFICE OF THE ASSESSOR**

Rick Auerbach, Assessor  
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# EXECUTIVE SUMMARY

Managing an annual budget exceeding \$108 million and a budgeted staff of 1,524 employees, the Assessor is responsible for preparing the property assessment roll, processing exemption claims and ownership changes, updating maps and legal descriptions of property, and representing the County's interests at Assessment Appeals Board hearings.

In an effort to maximize productivity, increase efficiency, and enhance the public trust, the Assessor has developed a five-year strategic plan to direct the office. This strategic plan centers on the four organizational goals adopted by the Board of Supervisors. These goals include service excellence, workforce excellence, organizational effectiveness, and fiscal responsibility. The intent of each of these goals is to:

1. Provide easy access to quality services and information.
2. Enhance the quality and productivity of Assessor staff.
3. Optimize office organizational and continue collaborative efforts with other County departments.
4. Secure permanent and stable funding for property tax administration.

The Assessor has developed specific strategies to accomplish these goals by promoting:

1. Prompt and effective service to the public.
2. High employee morale.
3. Cooperation among public agencies associated with the administration of property taxes.

# MISSION STATEMENT

To create an accurate assessment roll and provide the best public service.

**WE:**

1. Produce a fair, cost-effective, accurate, and timely assessment roll in accordance with the law.
2. Provide high-quality service to the public and other governmental agencies.
3. Promote an environment of professionalism and high employee morale.

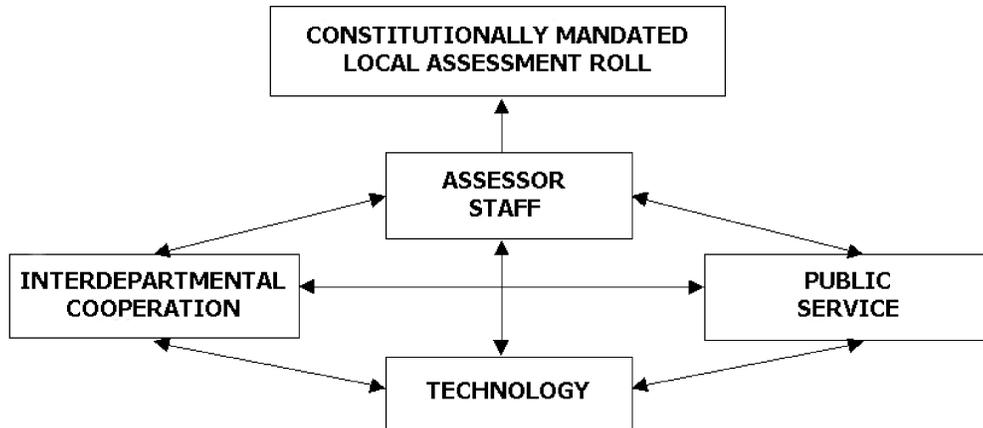


Figure 1. Interrelated items associated with the Assessor's Mission.

# CURRENT OPERATIONS

For the 2000-2001 fiscal year, the Assessor will manage a \$108 million operating budget and a budgeted staff of 1,532 employees. The Assessor's staff is located in eight regional offices, downtown headquarters, and two public service satellites.

In the 1999-2000 fiscal year, the Assessor's Office will complete an estimated 620,000 new construction, reappraisable transfer and Proposition 8 assessments; 41,000 assessment appeals cases; 176,700 personal property assessments, 2,400 mandatory audits, 1,400 non-mandatory audits; 13,700 parcel changes; 122,500 exemption claims; and 56,400 data recovery items. For the 1999 assessment roll, the Assessor's efforts resulted in the delivery of a local roll value of \$596 billion.

## SCOPE OF FIVE-YEAR STRATEGIC PLAN

The objectives of the strategic plan and items within each objective will guide the direction of the Assessor's Office for the next five years. Each component of the plan serves to fulfill the Assessor's mission and supports the County's vision.

### GOALS, OBJECTIVES, AND STRATEGIES:

***SERVICE EXCELLENCE GOAL:*** *Provide easy access to quality services and information.*

#### **OBJECTIVE:**

Evaluate services and customer needs.

*Strategies:*

1. Create a public service focus group to evaluate our current procedures and policies and to recommend improvements. Target date: Current and ongoing.
2. Continue monitoring the volume and nature of public service requests to effectively assess and address customer needs. Target date: Current and ongoing.

#### **OBJECTIVE:**

Develop staff's ability to serve the public by providing training programs and increasing interdepartmental cooperation.

*Strategies:*

1. Offer continuous customer service and communications training to our customer service staff. Target date: Current and ongoing.
2. Coordinate with the Auditor-Controller and Treasurer and Tax Collector to cross-train staff in the duties and functions of each department. Target date: October 2000.
3. Update documentation which describes the functions and responsibilities of the Assessor's, Auditor-Controller's, and Treasurer and Tax Collector's Offices. Also coordinate responsibility for maintaining sections of the documentation with the appropriate office(s). Target date: October 2000.

4. Develop direct lines of communication with staff from Auditor-Controller and Treasurer and Tax Collector whereby designated Assessor staff may easily request assistance from the respective departments. Target date: July 2000.

## **OBJECTIVE:**

Maximize public information available via telephone and the Internet.

### *Strategies:*

1. Implement an integrated telephone answering system for researching and generating automated responses on outstanding tax bill amounts, property information, and referrals to the Assessor, Auditor-Controller, and Treasurer and Tax Collector, as appropriate. Target date: December 2000.
2. Expand Assessor's Web site services to include online filing of SBE mandated annual forms, and property data research capabilities using Geographic Information System (GIS) software. Target date: 2000-2002.

***WORKFORCE EXCELLENCE GOAL:*** *Enhance the quality and productivity of Assessor staff.*

## **OBJECTIVE:**

Recruit, develop, and retain dedicated and productive employees.

### *Strategies:*

1. Recruitment
  - a. Continue efforts at job fairs. Target date: Current and ongoing.
  - b. Research establishing a summer appraisal internship program for college students. Target date: December 2000.
2. Training
  - a. Establish an orientation program for incoming non-appraisal staff that includes an orientation and formalized curriculum. Target date: July 2000.
  - b. In cooperation with the Department of Human Resources Training Academy, train selected staff and higher-level management in personnel relations and management skills. Target date: Current and ongoing.

- c. Succession planning: Identify and continue preparing management staff for future assumption of higher-level management positions. Target date: Current and ongoing.
- d. Establish a mentoring program for appraisal and clerical staff modeled after the existing upper-management succession-planning program. Target date: 2000 calendar year and continual implementation.
- e. Continue supervision training for existing and incoming first-level management staff. Target date: Current and ongoing.
- f. Offer PC training to all staff for office-wide standard software applications. Target date: Current and ongoing.
- g. Expand professional training for staff by utilizing training provided by organizations, such as the California Assessors' Association, the International Association of Assessing Officers, and the State Board of Equalization. Target date: Current and ongoing.
- h. Expand training for Systems Division staff in order to maintain a knowledge base for existing and developing technologies. Target date: Current and ongoing.

## **OBJECTIVE:**

Create a better work environment.

### *Strategies:*

- 1. Continue offering personal/professional development seminars. Target date: Current and ongoing.
- 2. Re-establish the Division Chiefs Committee to develop a plan for the rotation of staff: Target date: December 2000.
- 3. Establish ongoing labor/management committees with the Service Employees International Union-Local 660 and the California Association of Professional Employees. Target date: July 2000.
- 4. Renovate areas of the Hall of Administration headquarters. Target date: July 2000 and ongoing.

## **OBJECTIVE:**

Promote cultural diversity and understanding among staff and the public.

### *Strategies:*

- 1. Provide cultural diversity training to all staff. Target date: July 2001.
- 2. Provide sexual harassment training to all staff. Target date: July 2001.

## **ORGANIZATIONAL EFFECTIVENESS GOAL:**

*Optimize office organization and continue collaborative efforts with other County departments.*

### **OBJECTIVE:**

Maximize productivity through office restructuring and infrastructure development.

#### *Strategies:*

1. Consolidate eleven regional offices into four district offices, and one Lancaster regional office. Target dates: North Area, April 2000; West Area, July 2000; East Area, January 2001; South Area, August 2001.
2. Improve and expedite the decision making process by decentralizing department management. Target date: January 2001.
3. Move toward implementation of a computerized "paperless" office facilitated by online manuals, personnel tracking, timesheet and requests for time-off filing, performance evaluation processing, meeting scheduling, appraisal processing, etc. Target date: 2001-2004.
4. Implement the re-engineered secured business processes and explore sources for funding. Target dates: Request for Proposals, August 2000; Selection of contractor, January 2001; phased-in implementation beginning July 2001 ending July 2005.
5. Re-engineer Unsecured Business Processes. Target date: July 2000 through December 2000.
6. Re-engineer departmental administrative processes in conjunction with the County CIO initiative regarding Enterprise Resource Planning. Target date: Current and ongoing.
7. Install a networked terminal on each staff member's desk, as appropriate, and network all district offices with one another and the Hall of Administration headquarters. Target date: Current to December 2001.
8. Standardize office software and periodically review its effectiveness. Target date: Current to December 2001.
9. Provide Assessor staff access to various electronic information, such as Geographic Information System (GIS) data, Deeds, and Preliminary Change Of Ownership Records. Target date: January 2001.

## **OBJECTIVE:**

Improve the collaborative effort among all public and private stakeholders in the property tax administration process.

### *Strategies:*

1. Continue collaborative efforts with the Interdepartmental Steering Committee. Target date: Current and ongoing.
  - a. Continue efforts to integrate departmental systems. Target date: Current and ongoing.
  - b. Move toward interdepartmental integration of delivering information to the public. Target date: Current and ongoing.
2. Work with business owners to equalize and improve assessment procedures for business equipment. Target date: March 2000 to December 2001.

***FISCAL RESPONSIBILITY GOAL:*** *Secure permanent and stable funding for property tax administration.*

### *Strategy:*

Lobby for legislation to permanently fund the administration of property taxes. Target date: 2000-2001.

## CONCLUSION

In an effort to provide the most efficient use of tax revenue, provide the highest quality public service, and create the most hospitable work environment possible, the Assessor's Office has developed the preceding strategic plan. This plan complements the County's goals of service excellence, workforce excellence, organizational effectiveness, and fiscal integrity in the following manner.

1. By enhancing public service efforts, the Assessor hopes to continue offering customers easy, comprehensive, and friendly interactions with the office, whether in person, by telephone, or via the Internet.
2. By enhancing staff through training, motivation and recruitment, the Assessor will fill the office with a high quality, motivated, informed, and effective staff. This will enable the Assessor's Office to prepare the local roll efficiently, cooperate with other public agencies involved in the property tax administration process, and professionally and comprehensively address any issues the public may have.
3. By consolidating regional offices and improving infrastructure, the Assessor will provide a sound, progressive work environment that facilitates the collection and dissemination of property tax information as well as provide one-stop facilities where customers may obtain answers to their property tax related questions.
4. By developing technological infrastructure, the Assessor will provide employees with the most advanced technologies available to prepare the local roll. Technological infrastructure will also facilitate the accessibility and delivery of information with the office, to public and private agencies, and to the public.
5. By lobbying for legislation that permanently funds the costs incurred in the administration of property taxes, the Assessor will maintain the optimal staffing levels and development that are necessary for the efficient preparation of the local roll and the effective delivery of the highest standard of public service.

In summary, the Assessor is committed to high standards of efficiency, effectiveness, service, and cooperation. Every aspect of this strategic plan serves to fulfill these standards.

**Table 1. Timeline for Implementation of Assessor's Objectives**

Goal/Objective	2000				2001				2002				2003				2004			
	Q1	Q2	Q3	Q4																
<b>SERVICE EXCELLENCE</b>																				
Services and Customer Needs:																				
Create Public Service Focus Groups	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Monitor Public Service Request	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Provide Training Programs:																				
Customer Service and Communications Training	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Cross Training with A-C and T&TC				■																
Update Documentation				■																
Directly Communicate with A-C and T&TC			■																	
Maximize Public Information Available:																				
Intergrated Telephone System				■																
Expand Web Site Service	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
<b>WORKFORCE EXCELLENCE</b>																				
Recruit, Develop and Retain Employees:																				
Job Fairs	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Summer Internship				■																
Orientation Program of Non-APP, Staff			■																	
Management Skills	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Succession Planning	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Staff Mentoring	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Supervision Training	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
P C Training	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Expanded Training	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Systems Division Training	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Create A Better Work Environment:																				
Development Seminars	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Division Chiefs Committee				■																
Labor Management Committees			■																	
Renovate Areas of the Hall of Administration			■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Promote Cultural Diversity:																				
Cultural Diversity Training							■													
Sexual Harassment Training							■													

**Table 1 (continued). Timeline for Implementation of Assessor's Objectives**

Goal/Objective	2000				2001				2002				2003				2004			
	Q1	Q2	Q3	Q4																
<b>ORGANIZATION EFFECTIVENESS</b>																				
Max. Productivity Through Office Restructuring and Infrastructure Dev.																				
Office Consolidation:																				
North Area		■	■																	
West Area			■	■																
East Area					■	■														
South Area							■	■												
Decentralize Department Mgmt.					■	■														
Implement Paperless Office					■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Re-engineered Secured Business Process:																				
Request for Proposal			■	■																
Contractor Selection					■	■														
Implementation*							■	■	■	■	■	■	■	■	■	■	■	■	■	■
Re-engineered Unsec. Bus. Process			■	■																
Re-engineered Admin. Process	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Upgrade and Install Hardware/Networks	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Standardize Software	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Access to Electronic Data					■	■														
Improve Collaborative Effort:																				
Continue with Interdepartmental Steering Committee	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Intergrate Dept. Systems	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Integration of Tax Data to the Public	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Improve Assessment Procedures for Business Equipment	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
<b>FISCAL RESPONSIBILITY</b>																				
Lobby for Legislation to Secure Permanent Funding	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■

\* Implementation is from July 2001 thru July 2005